Understanding the Choice to Reside in a Transit-Oriented Development

presented to

MTC Planning Committee

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presented by

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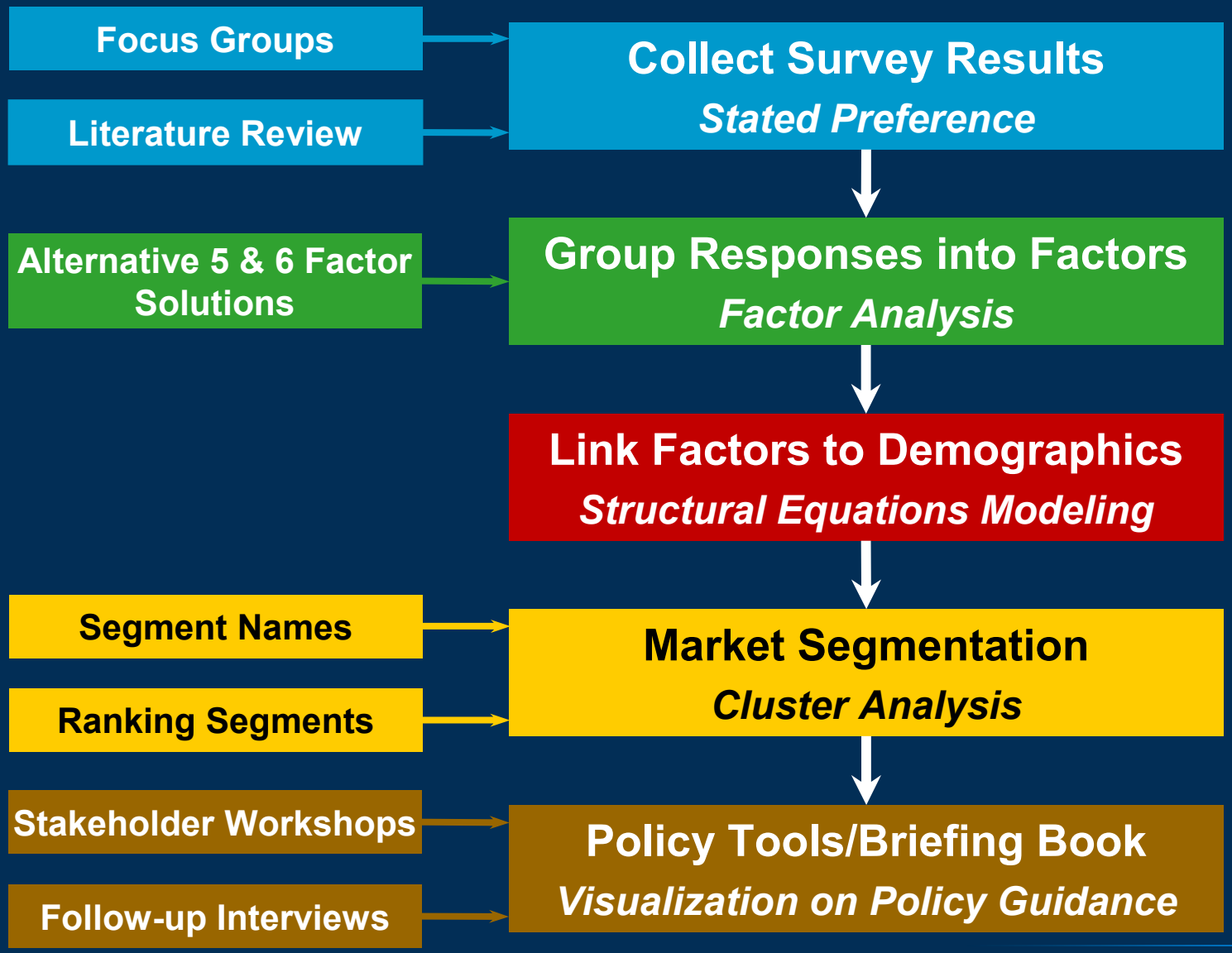
CAMBRIDGE SYSTEMATICS

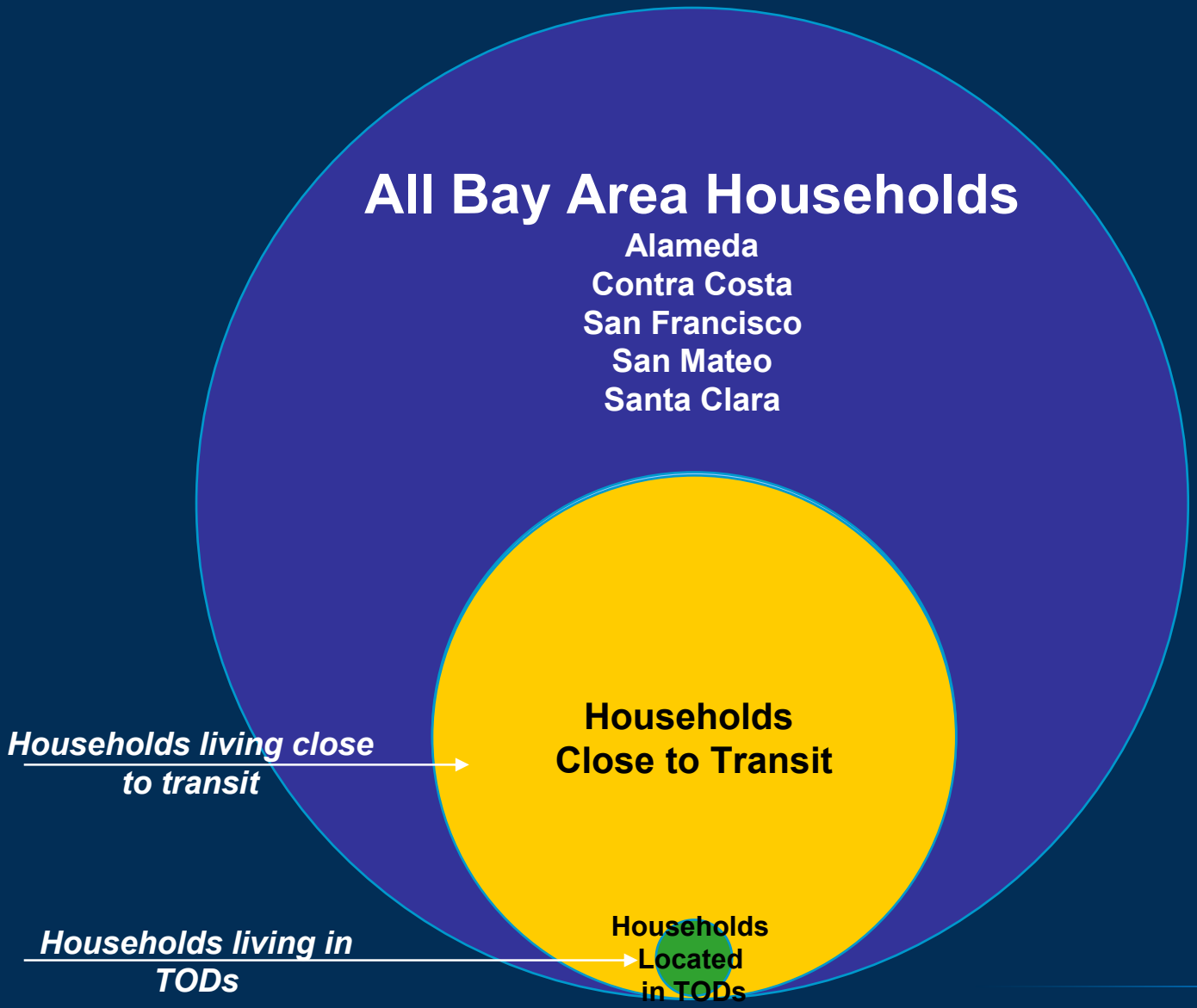
Agenda

- Study Methods and Process
- Survey Findings – Market Segments amenable to TOD
- Follow Up Questions for Key Market Segments
- Using results to address issues - Policy packages
- Examples to demonstrate process – 3 steps
- Your Comments and Questions

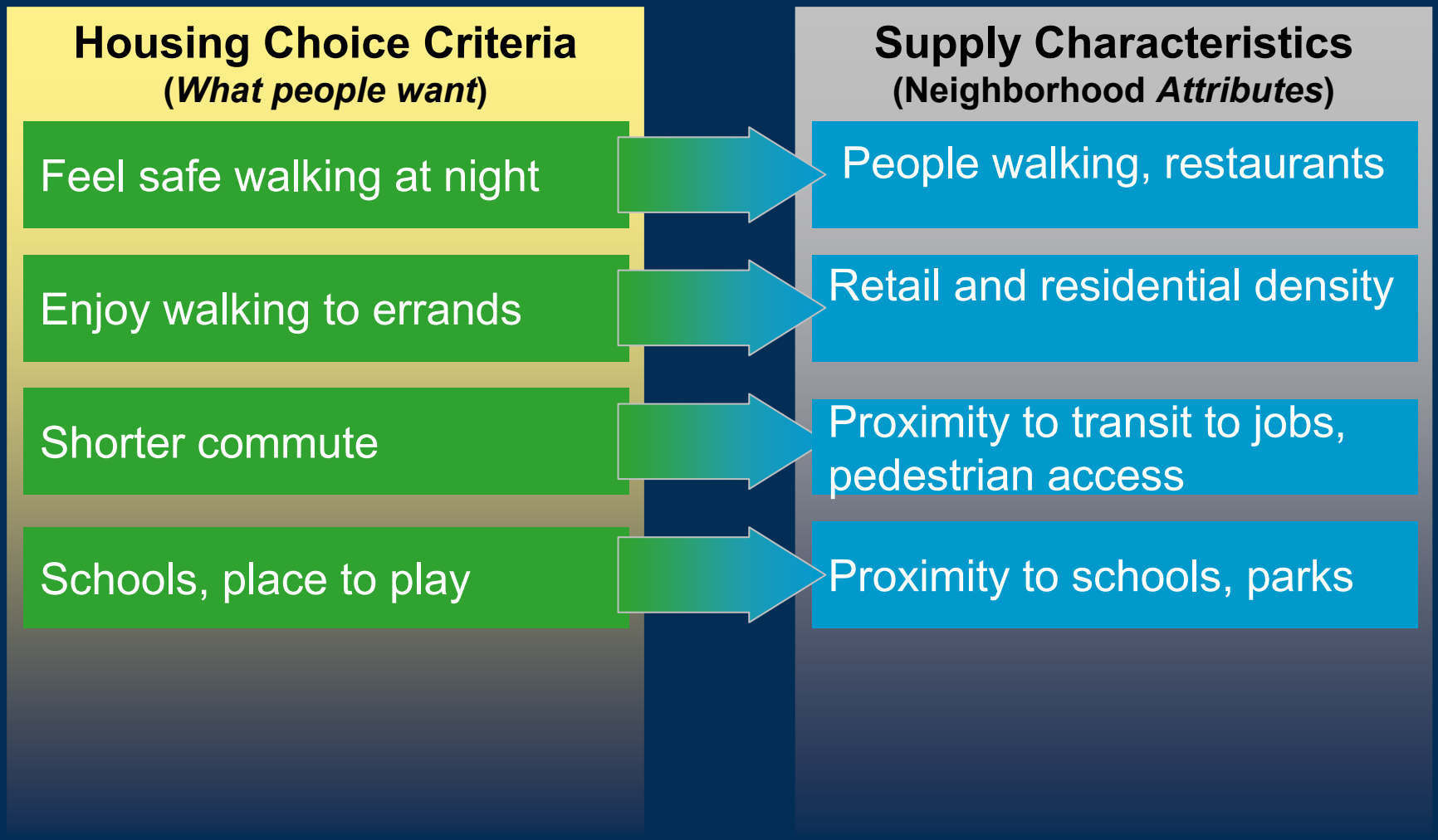
Market Segmentation
Analysis Steps & Tool Box Development



Potential Demand for TOD
Housing Proximity to Transit in Five Urban Counties



Understanding the Market for TOD
Demand Should Drive Supply



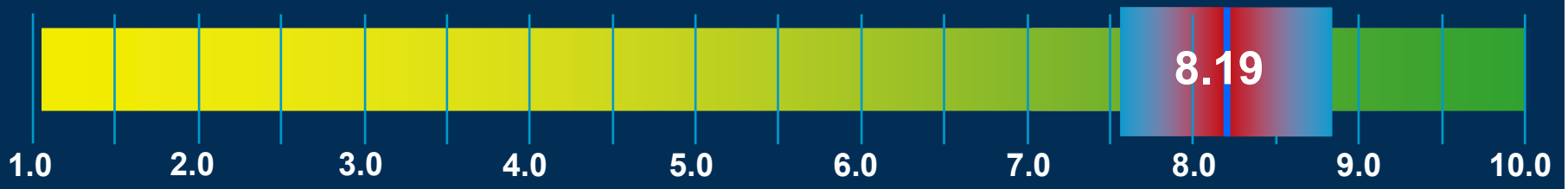
Six Key Attitudes Shape Housing Choice

several questions bundled into each attitude

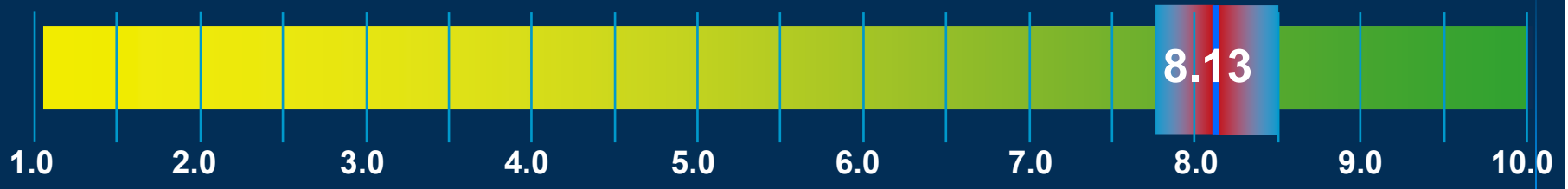
- Travel minimization
- Quiet and clean neighborhood
- Transit accessibility
- Driving orientation
- School quality
- San Francisco access

Overall Finding: Safe & Convenient Walking & Bicycling
Vital for Attracting Most Market Segments

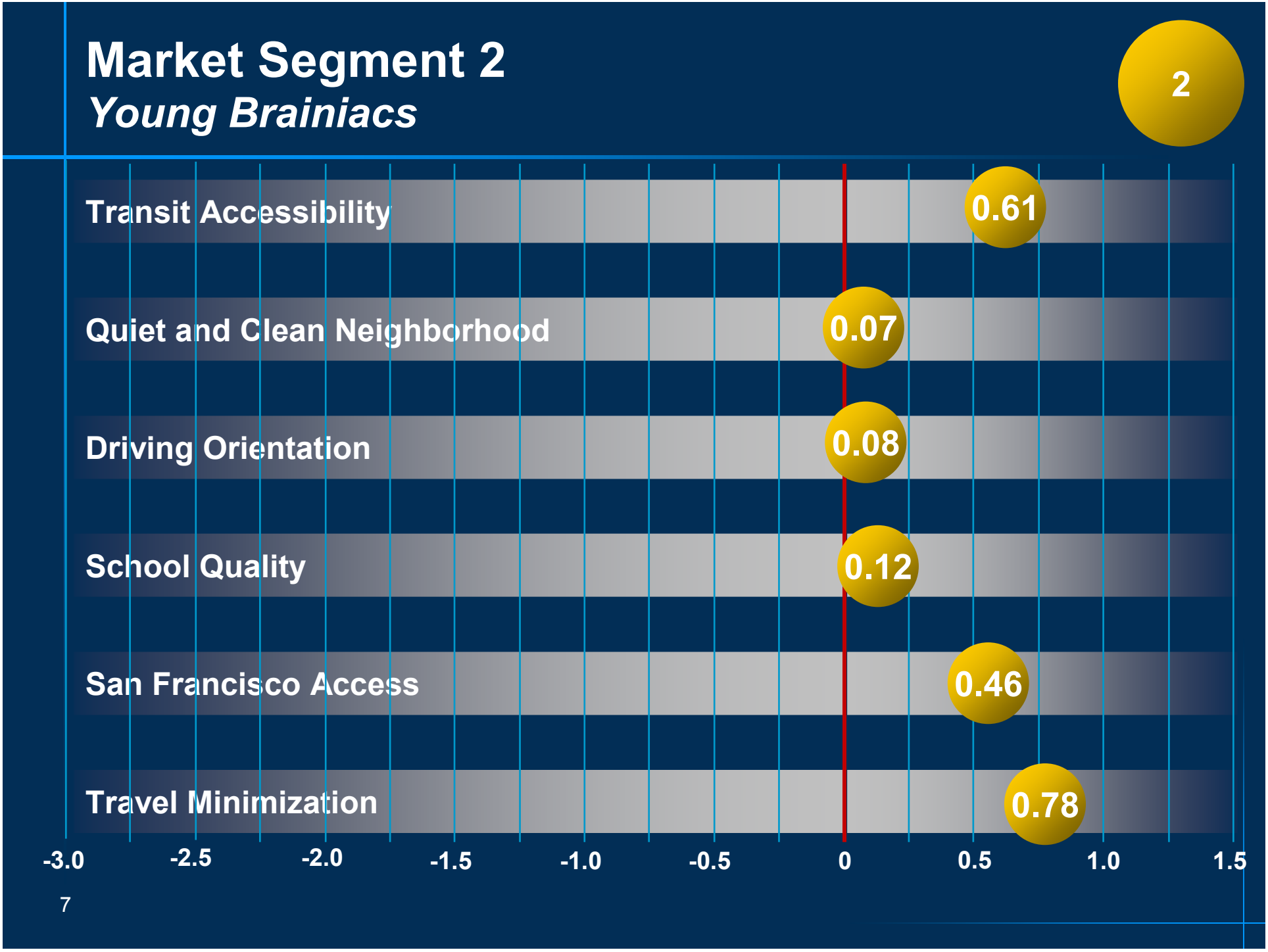
- *Having a neighborhood where I feel safe enough walking at night* - highest-rated statement on average, almost universally valued



- *Having a neighborhood where it is safe and convenient to walk and bicycle for errands* was the second highest rated statement



Market Segment 2
Young Brainiacs

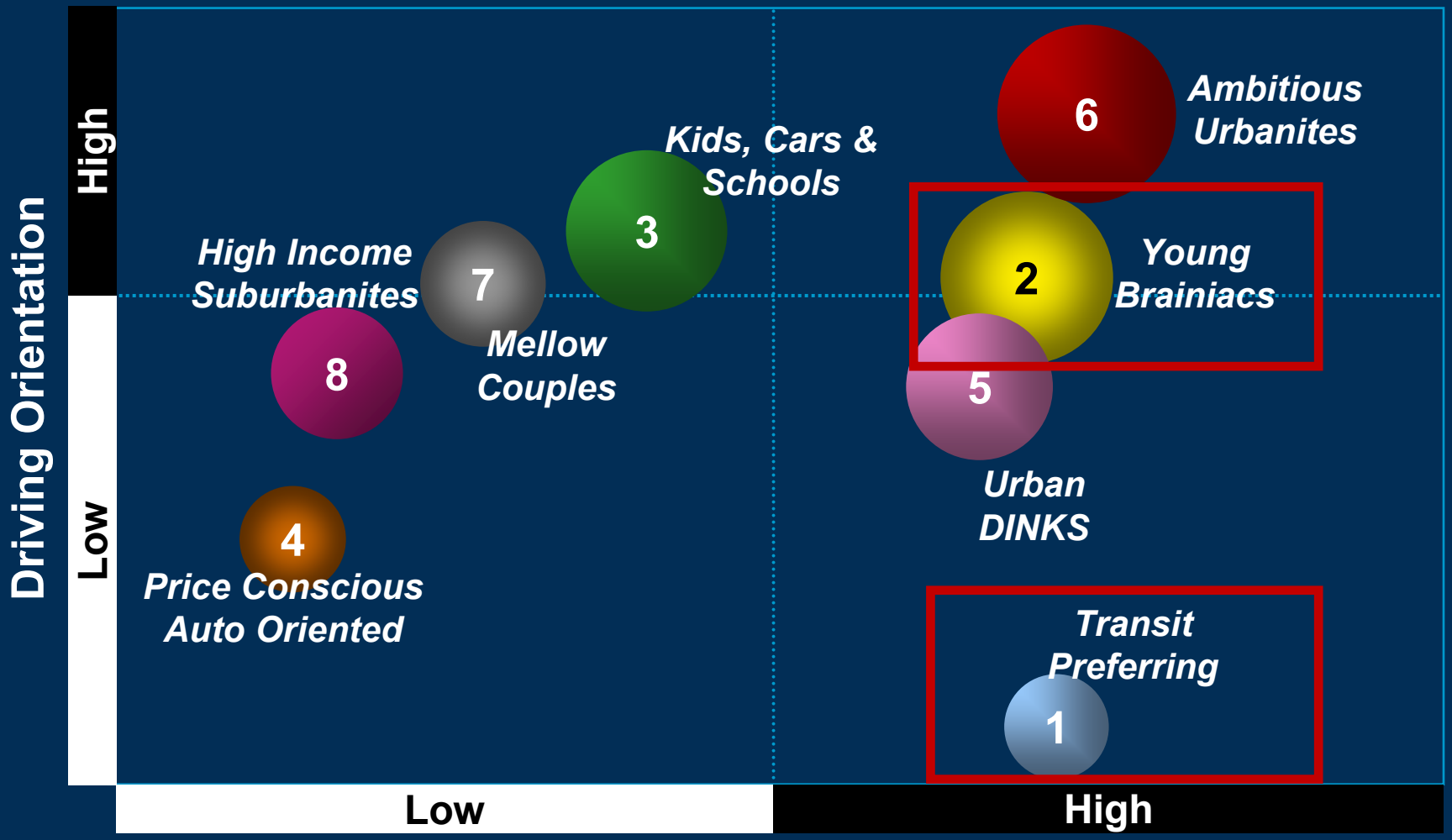


Market Segment 2
Demographic Highlights

2

- Highly educated (90% college or grad degree)
- Younger (almost 2/3 under 35)
- Half are married
- Small household size (50% are 1 or 2 person)
- Low rate of children in HH (25% of HHs)
- Low vehicle ownership (59 % have 1 or 0 autos)
- Mostly renters, some buyers (25%)

Market Segments:
Travel Minimization and Driving Orientation



Using Results to Make TODs Attractive

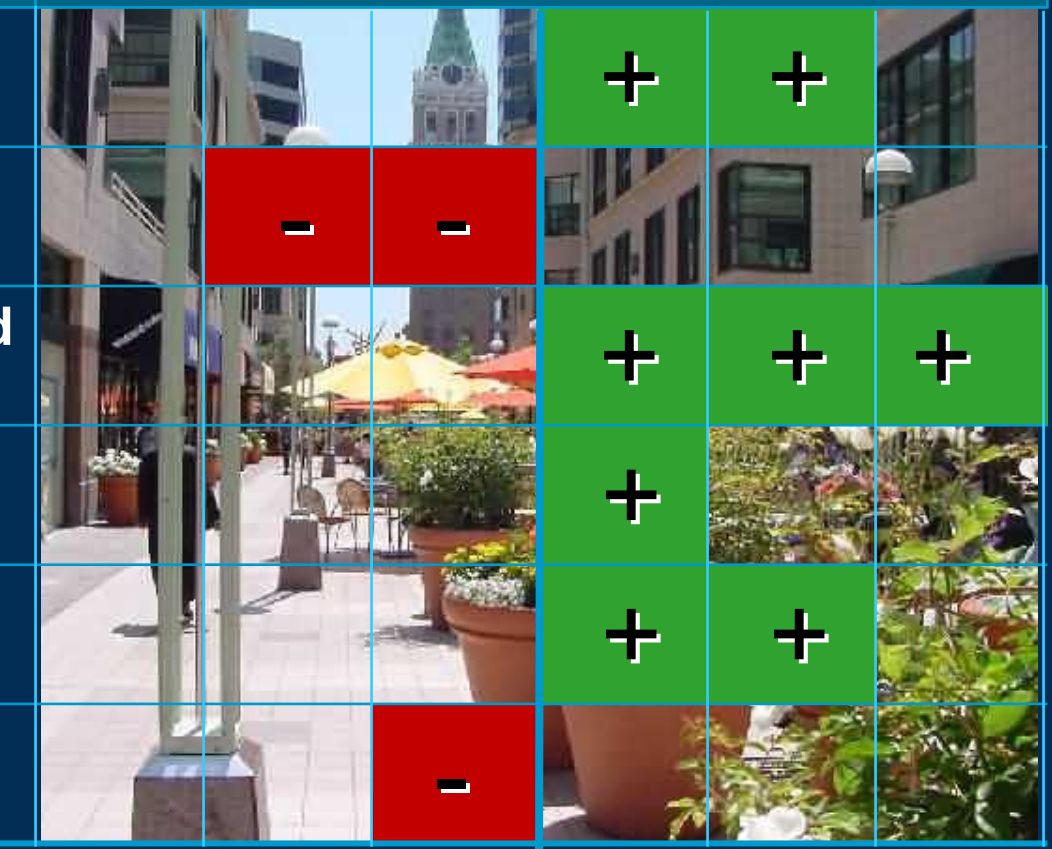
- **Step 1 – Evaluate TOD characteristics**
  - Transit, auto, density, land use mix, crime levels, school quality
- **Step 2 – Identify market segments to attract**
  - Compare characteristics with interests of each market segment
- **Step 3 – Apply strategies to attract target market segments**
  - Design and implement specific strategies

Step 1 – Evaluate your TOD: Potential Metrics

Attitude / Factor	Potential Metrics
Transit accessibility	• Transit LOS, transit use
Travel minimization mixed land use	• Land use mix, local destinations • Walkability score, walk audits, block density
San Francisco Access	• Travel time, transit frequency, driving time to San Francisco
School Quality	• Test scores, dropout rates, credentialed teachers, investment per pupil
Neighborhood quiet and clean	• Crime statistics, noise complaints • Neighborhood rating (walking, landscaping)
Driving orientation	• Residences with garage, time to find parking • Travel time to a freeway

Step 1: Evaluate your TOD
Example Score Card

Selection Criteria	City Center / Urban Neighborhood
Transit Accessibility	+ +
Driving Orientation	- -
Travel Minimization / Mixed Land Use	+ + +
School Quality	+
Neighborhood Quiet and Clean	+ +
San Francisco Access	-



Step 2 – Identify Segments to Attract
Importance of Conditions for Key Market Segments

Condition	Relative Importance Placed on Condition				
	Transit Preferring	*Urban DINKs*	*Young Brainiacs*	*Ambitious Urbanites*	*Mellow Couples*
Transit accessibility	High	High	High	High	Low
Travel min/mixed land uses	High	High	High	High	Low
San Francisco Access	Medium	Medium	Medium	High	Low
School Quality	Medium	Low	Medium	High	Low
Neighborhood quiet & clean	Low	Low	Medium	High	Medium
Driving orientation	Low	Low	Medium	High	Medium
Affordability	High	Medium	Medium	Medium	Low

Step 3 – Apply Strategies to Attract Segments
Sets of Strategies

- Safety and convenience of walking and bicycling
- Neighborhood quiet and clean
- Transit reliability, frequency, and access
- School quality and access
- Housing affordability
- Parking management

Step 3 – Safe & Convenient Walking & Bicycling Interviews

- Other people and "Eyes on the Street" creates a sense of security, presence of people enjoying nighttime activities
  - Nighttime activities, lighting, wide sidewalks, street crossings
- Convenience of walking and bicycling – "shortening the distances" between destinations
  - Mixing land uses, increasing density - local retail and other destinations within a close walk from home
  - Providing walking and bicycling infrastructure and amenities

Step 3 – Safe & Convenient Walking & Bicycling
Possible Performance Measures

- Walkability- see on-line tool walkability score using GIS maps (http://www.walkscore.com/).
- Street walk indicators - intersection density, block length
- Walk audits conducted by community or professionals
- Resident, visitor survey-perceptions of safety and walkability
- Crime statistics

Step 3 – Safe & Convenient Walking & Bicycling
Some Specific Strategies

- Zone for mixed use
- Install pedestrian-scale lighting around the TOD
- Zone for higher densities of nighttime uses
- Avoid large underutilized parking lots
- Provide pedestrian and bicycle amenities
- Create narrow street widths and short blocks to improve pedestrian safety and more direct access

Example -
Improving Walkability in a Suburban Center

- **Step 1- Evaluate current conditions**
  Many positive qualities but poor walkability

- **Step 2 - Identify segments to attract**
  Young Brainiacs, Ambitious Urbanites attracted
  Potential – larger shares of these, plus Mellow Couples, some Kids, Cars and Schools if good schools

- **Step 3 – Identify strategies to attract key segments**
  Improve pedestrian and biking design, traffic calming, trash and graffiti removal, control noise from traffic

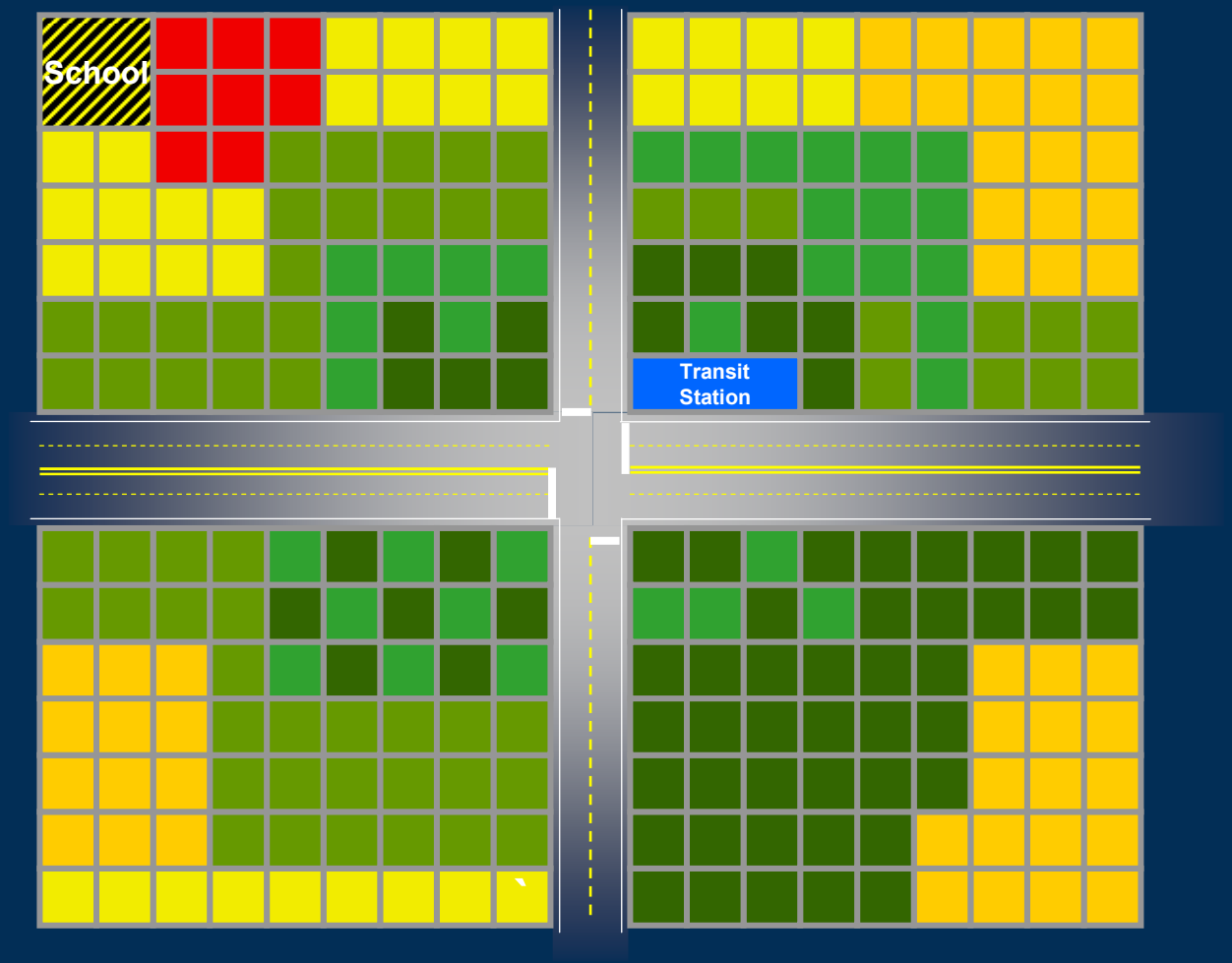
School Quality and Access Strategies

- Leveraging TODs Already Located Close to Good Schools
  - Focus on attracting Young Brainiacs
  - Improve sidewalks and initiate “safe routes to school”
- For TODs not proximate to distinguished schools
  - Improve local school
  - Attract a charter or independent school
  - Attracting market segments with less of a priority on schools - Transit Preferring, the Urban DINKs, Mellow Couples

Parking Management Strategies
Provide Parking for Those Willing to Pay for It

- Ambitious Urbanites and Mellow Couples want
  - To be able to drive around easily
  - Have convenient access to freeways, readily available parking, and private garages
- Provide parking for residents who are willing to pay for it
  - Unbundle the cost of parking from living or working space
  - Provide car sharing services
  - Sell permit parking to provide preferential access to street parking for local residents

Combining Strategies within the TOD Area
Attracting Segments Based on Distance from a Station

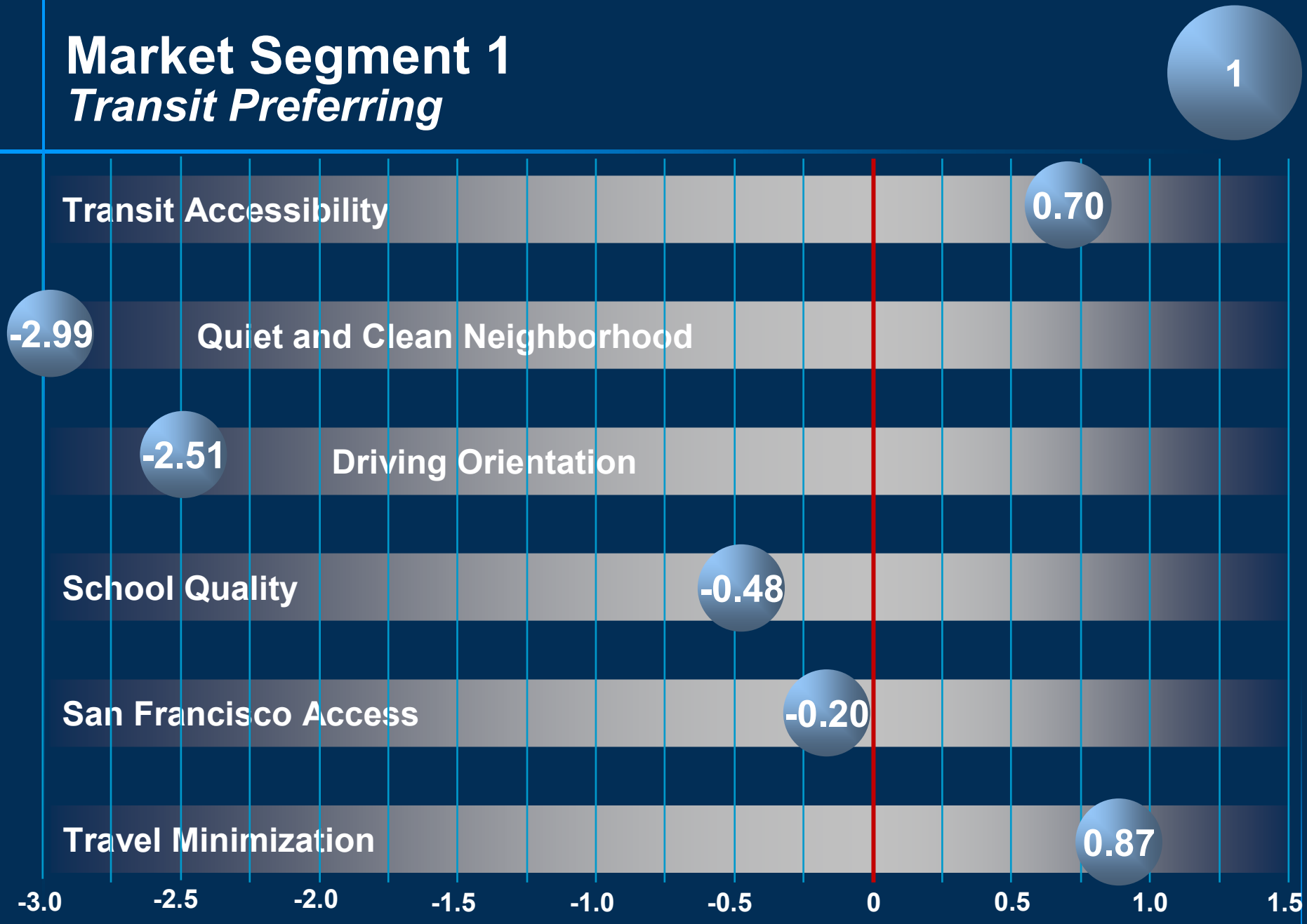


Next Steps

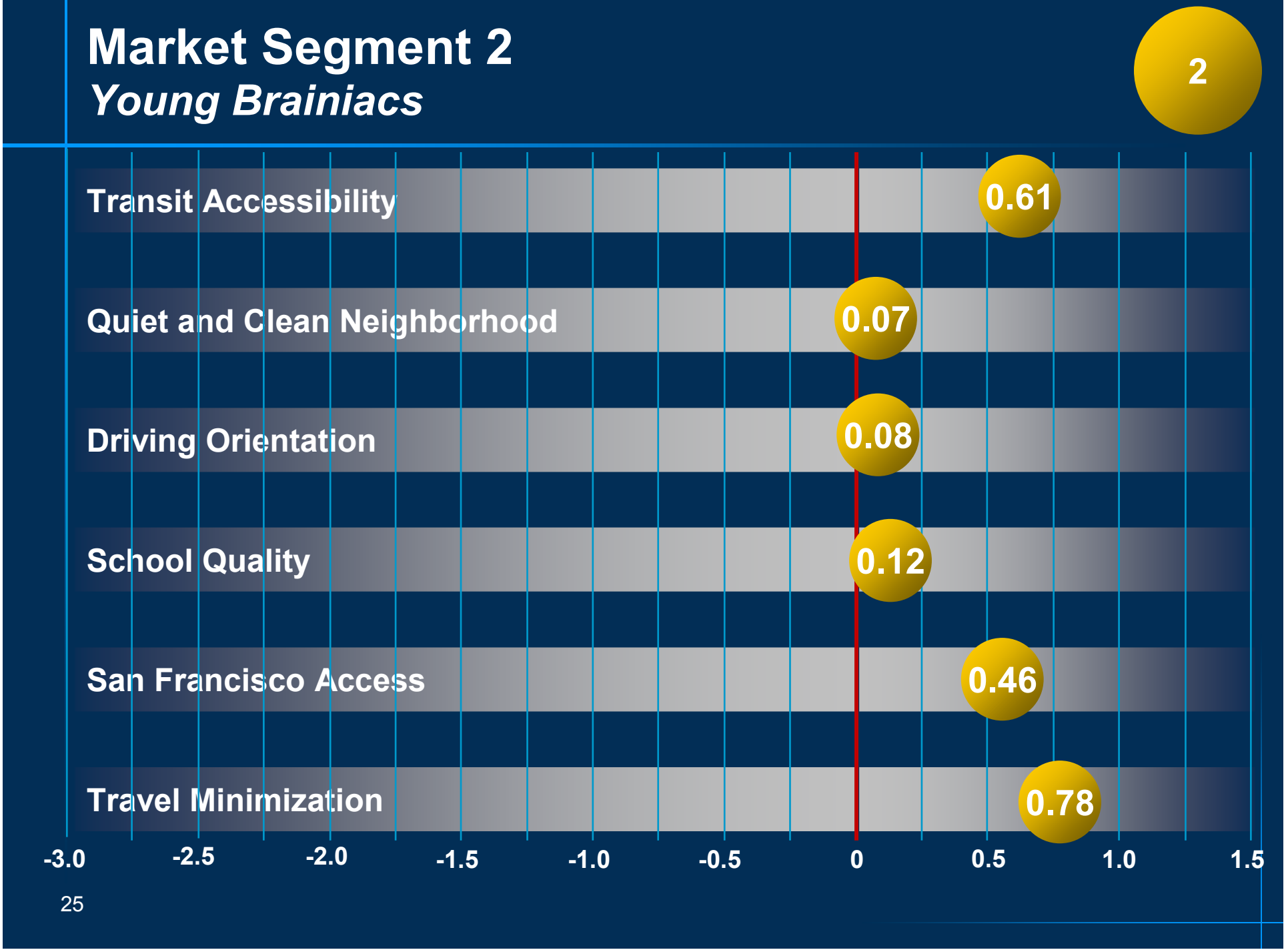
- Presentations to interested parties
- Finalize and distribute Briefing Book and technical reports, post on web
- Consider applicability to MTC supported planning processes –Station Area Planning, FOCUS/PDA outreach, TOD TAP, and TLC Design Guidelines

Appendix

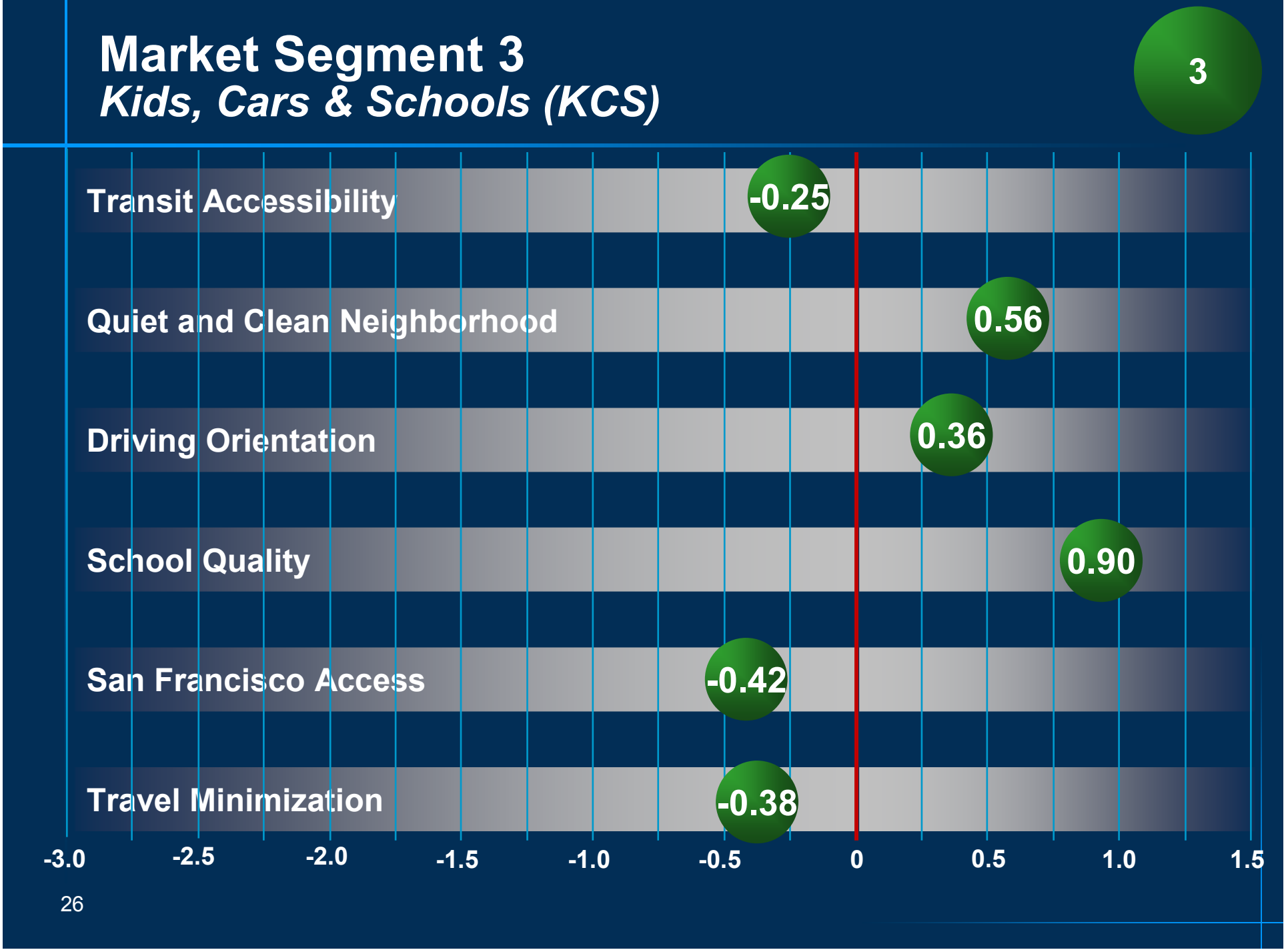
Market Segment 1
Transit Preferring



Market Segment 2
Young Brainiacs

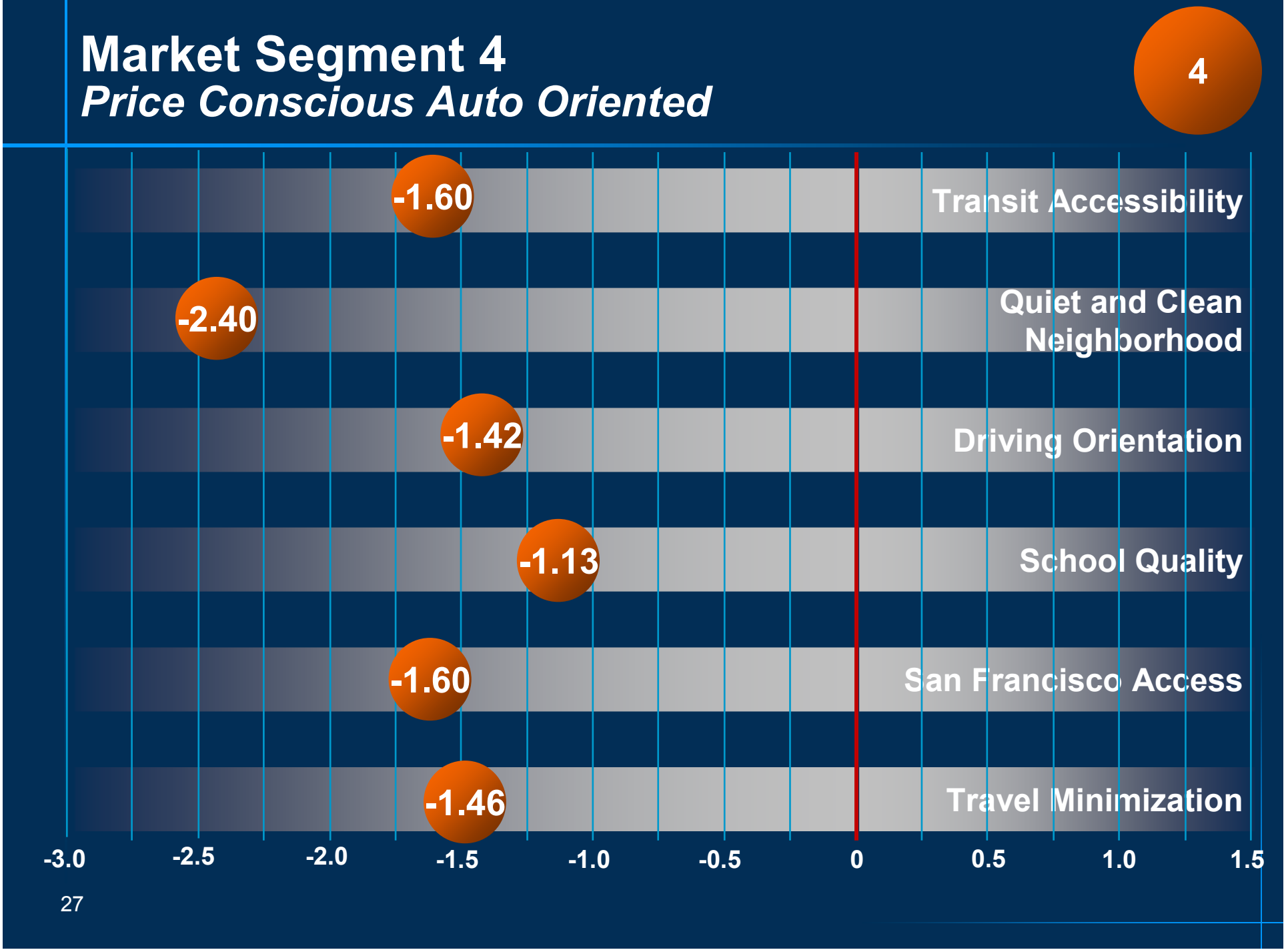


Market Segment 3
Kids, Cars & Schools (KCS)

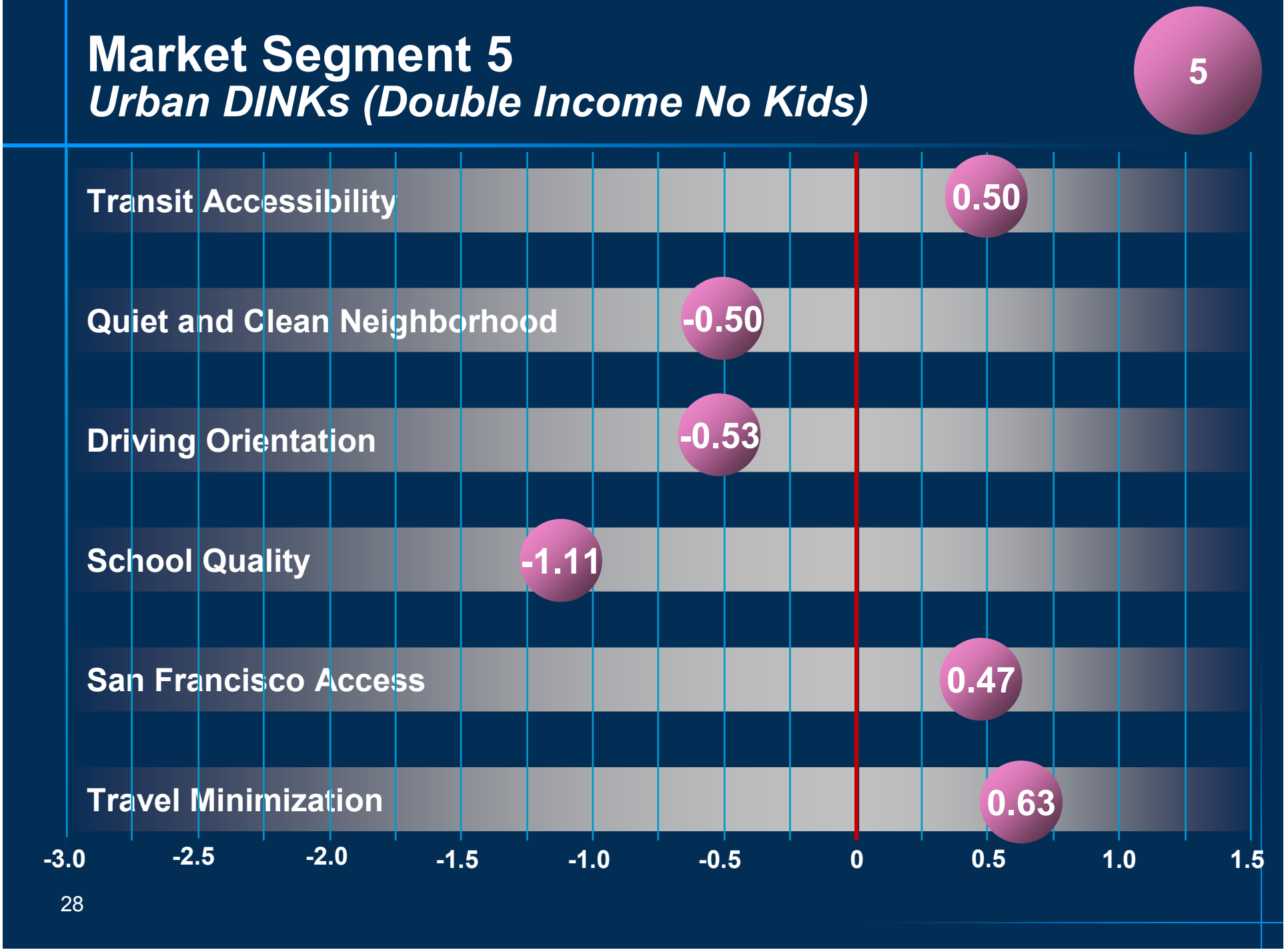


Market Segment 4

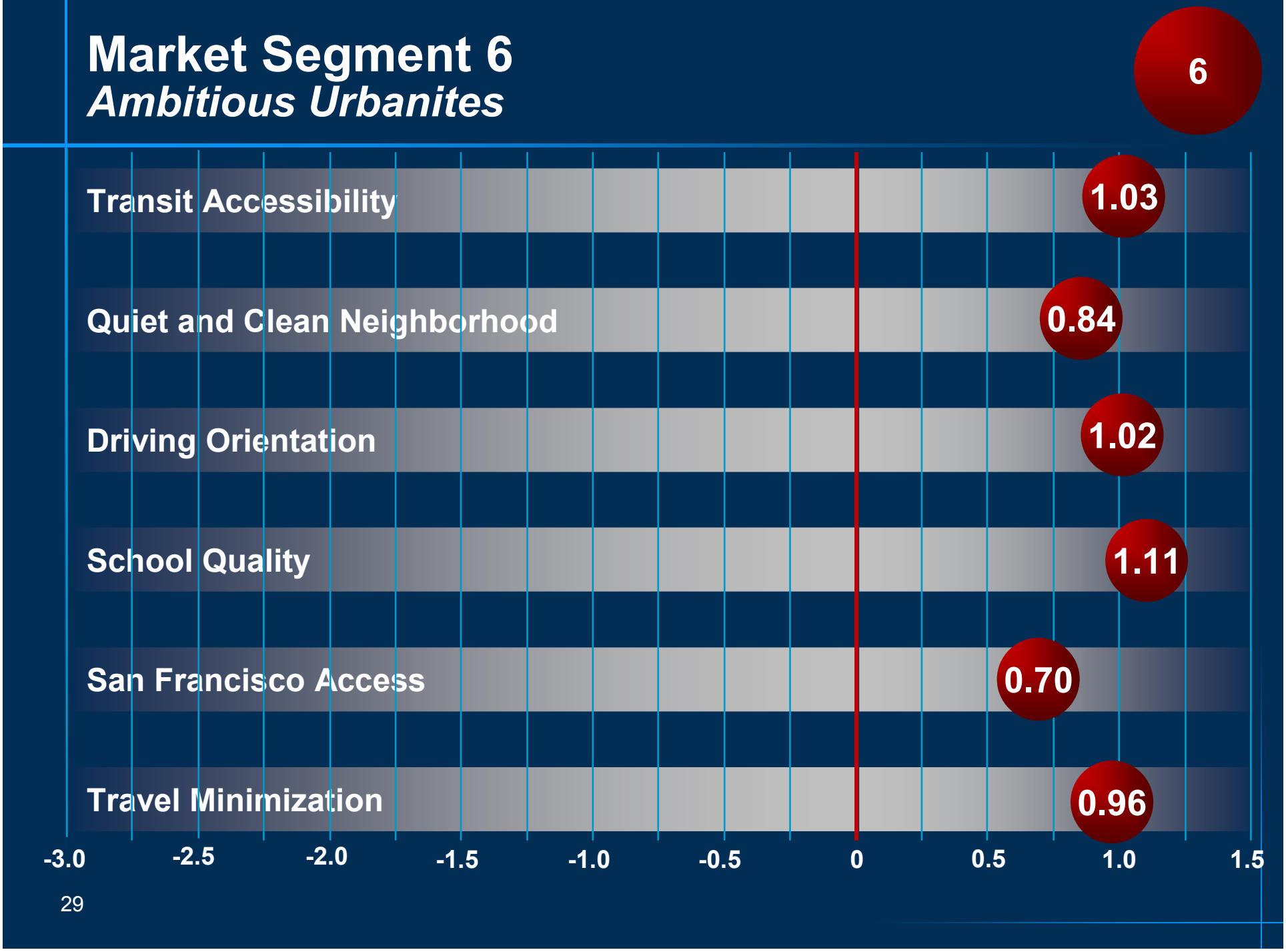
Price Conscious Auto Oriented



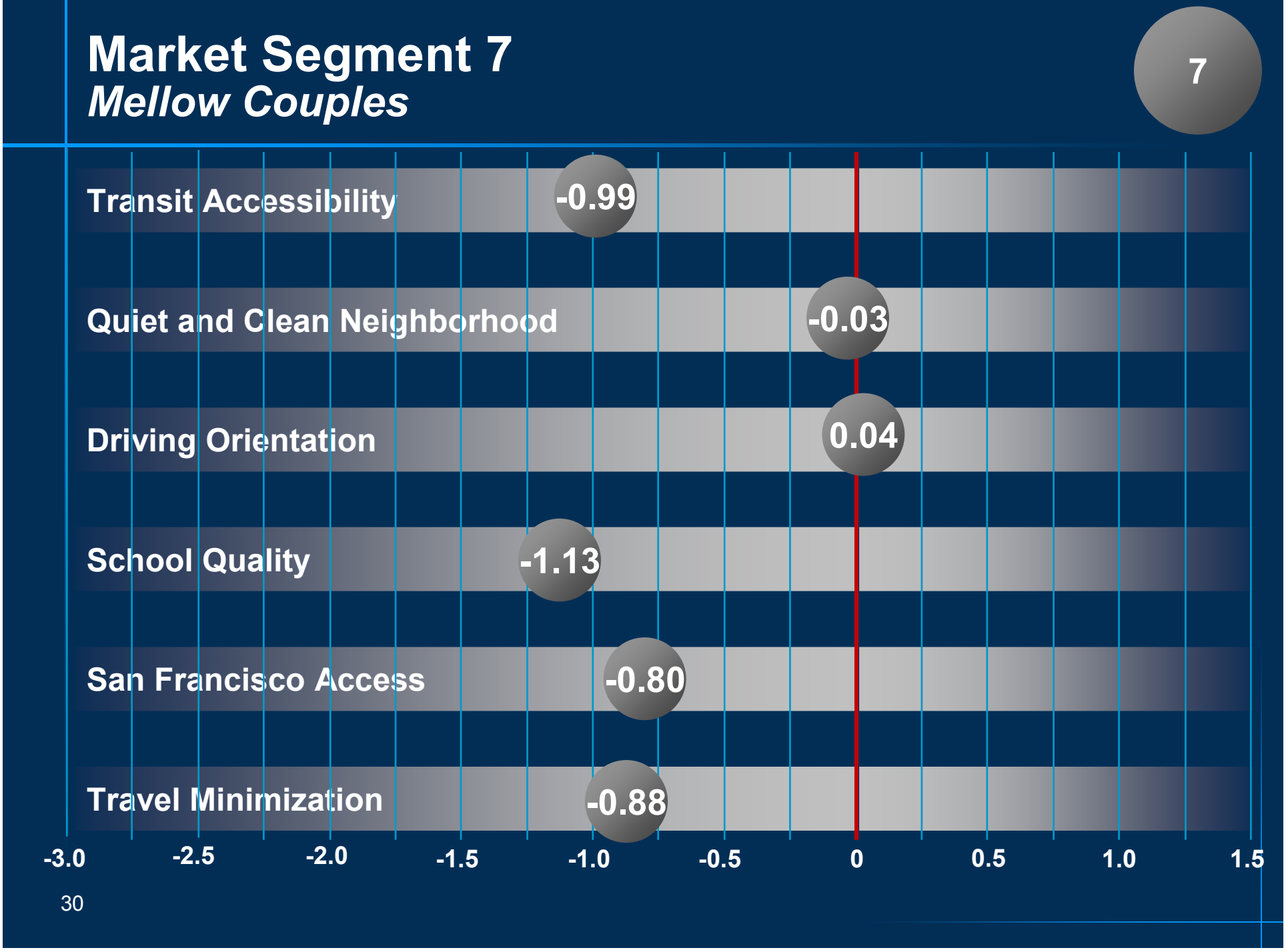
Market Segment 5
Urban DINKs (Double Income No Kids)



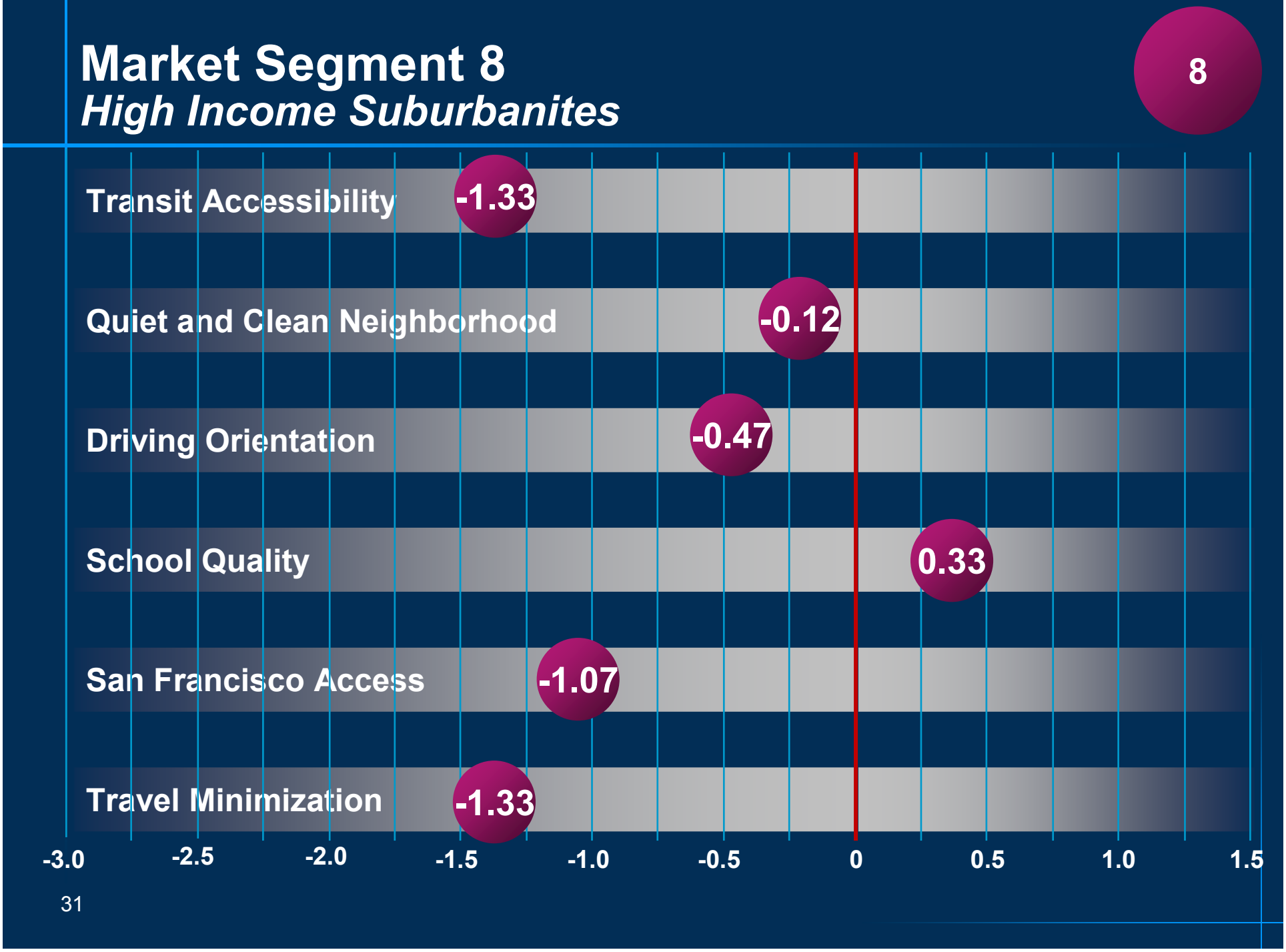
Market Segment 6
Ambitious Urbanites



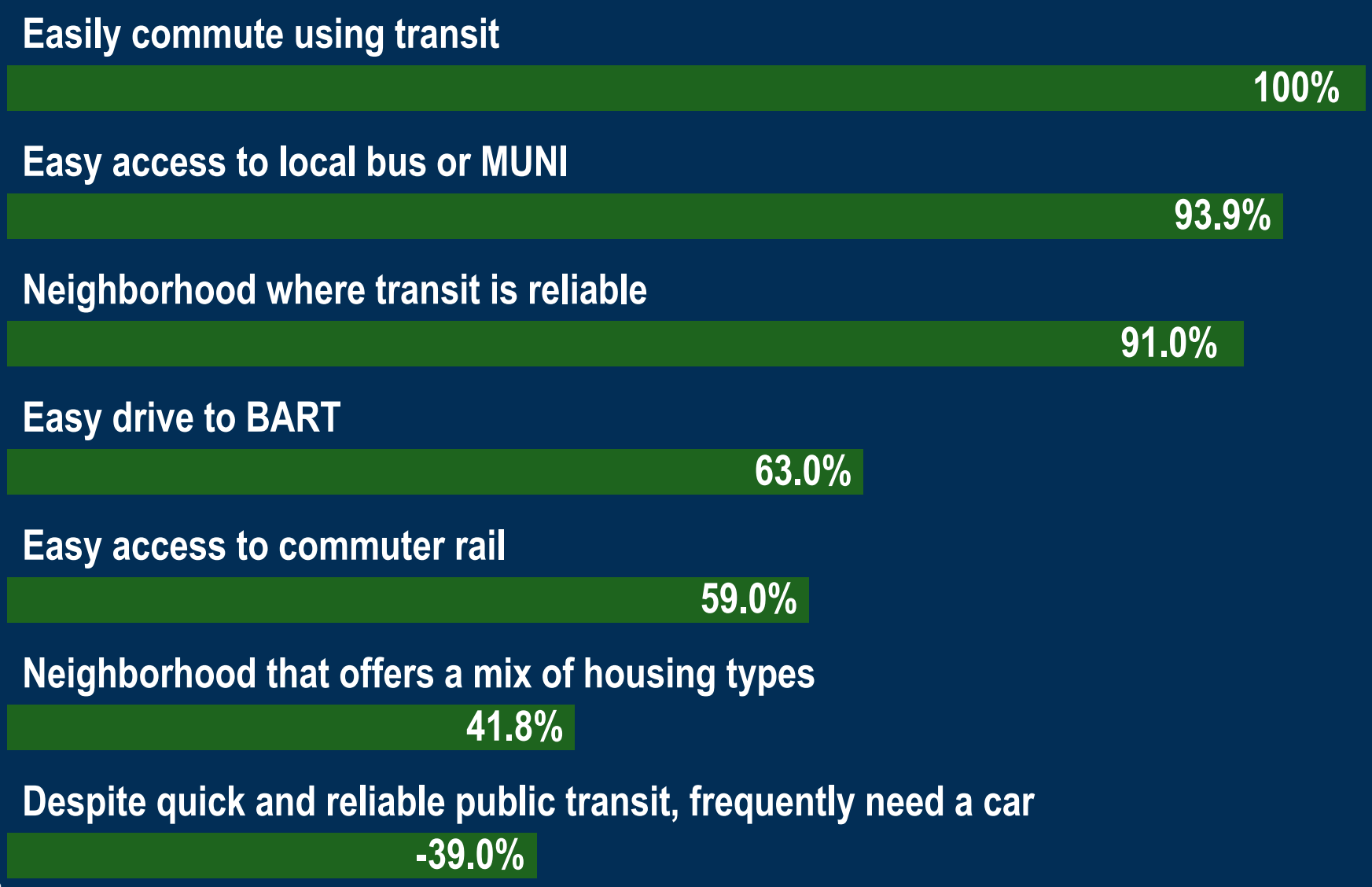
Market Segment 7
Mellow Couples



Market Segment 8
High Income Suburbanites

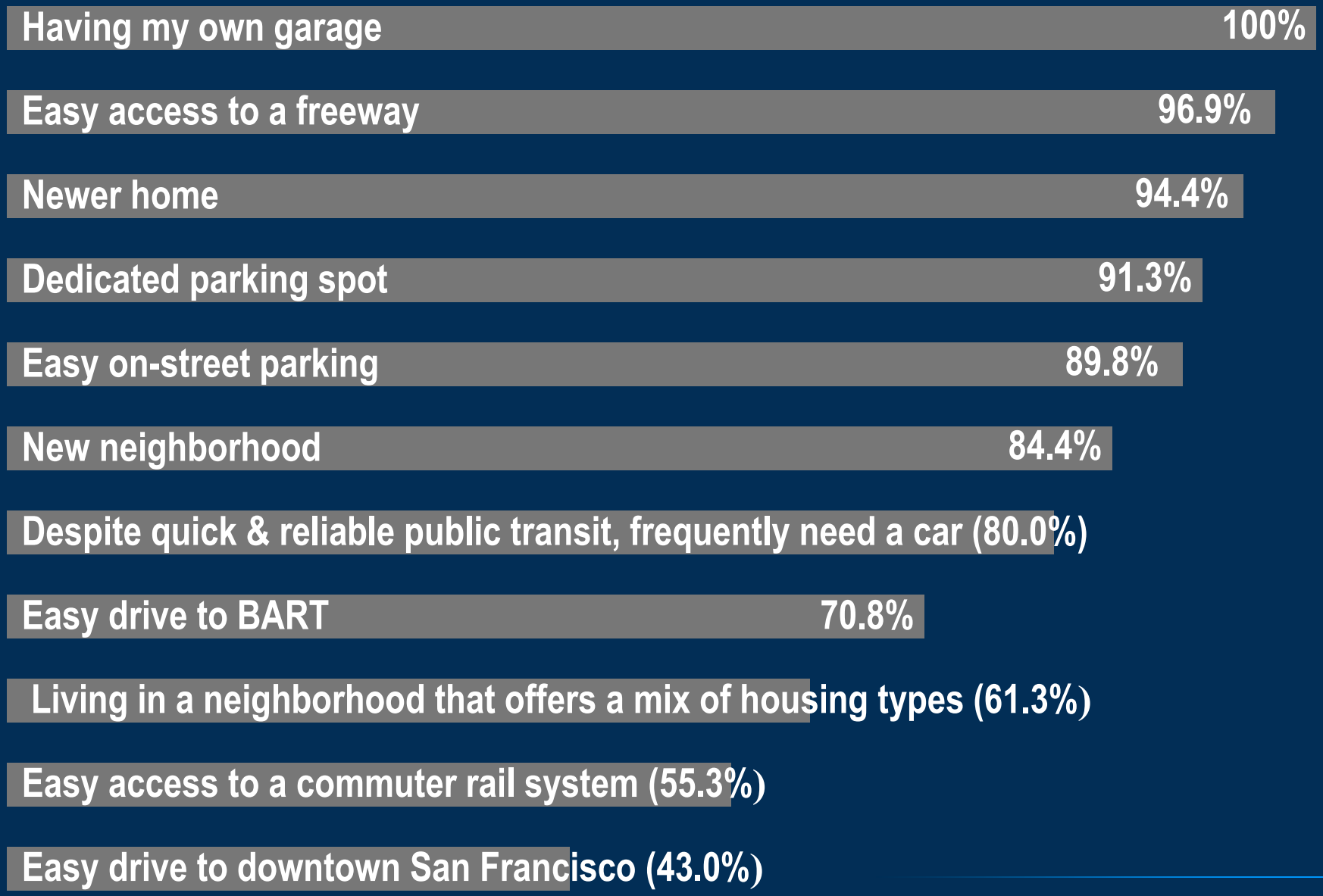


Transit Accessibility
Seven Statements

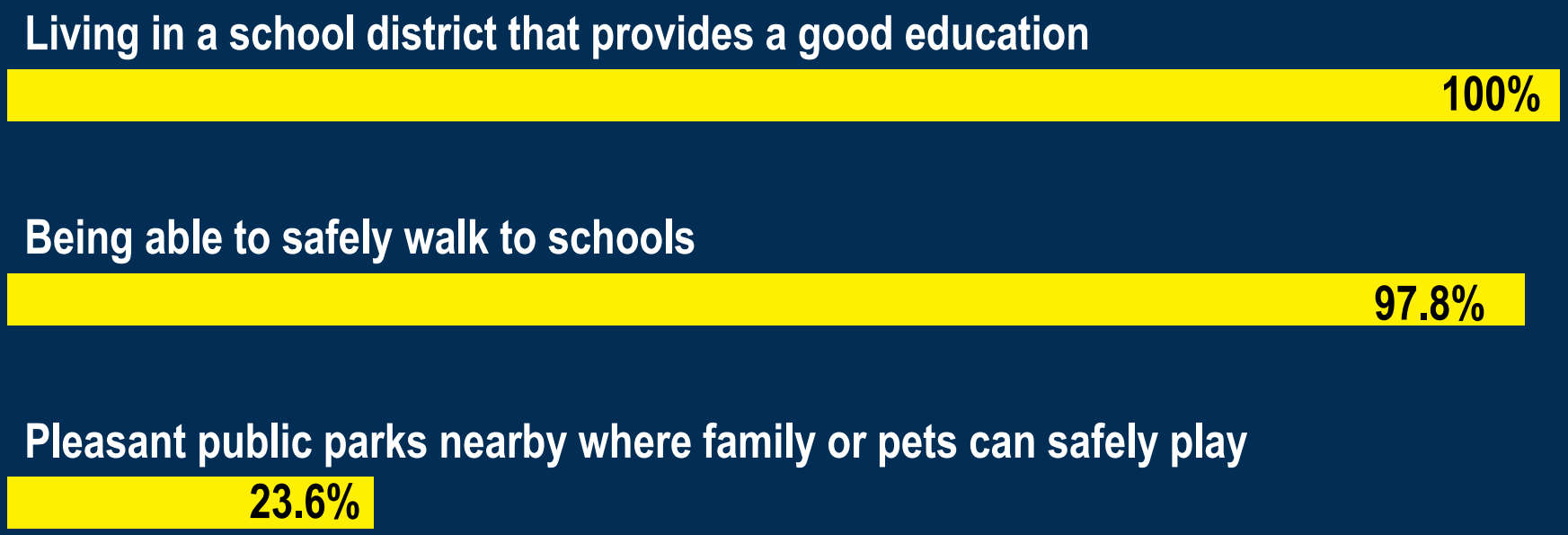


Quiet and Clean Neighborhood
Five Statements

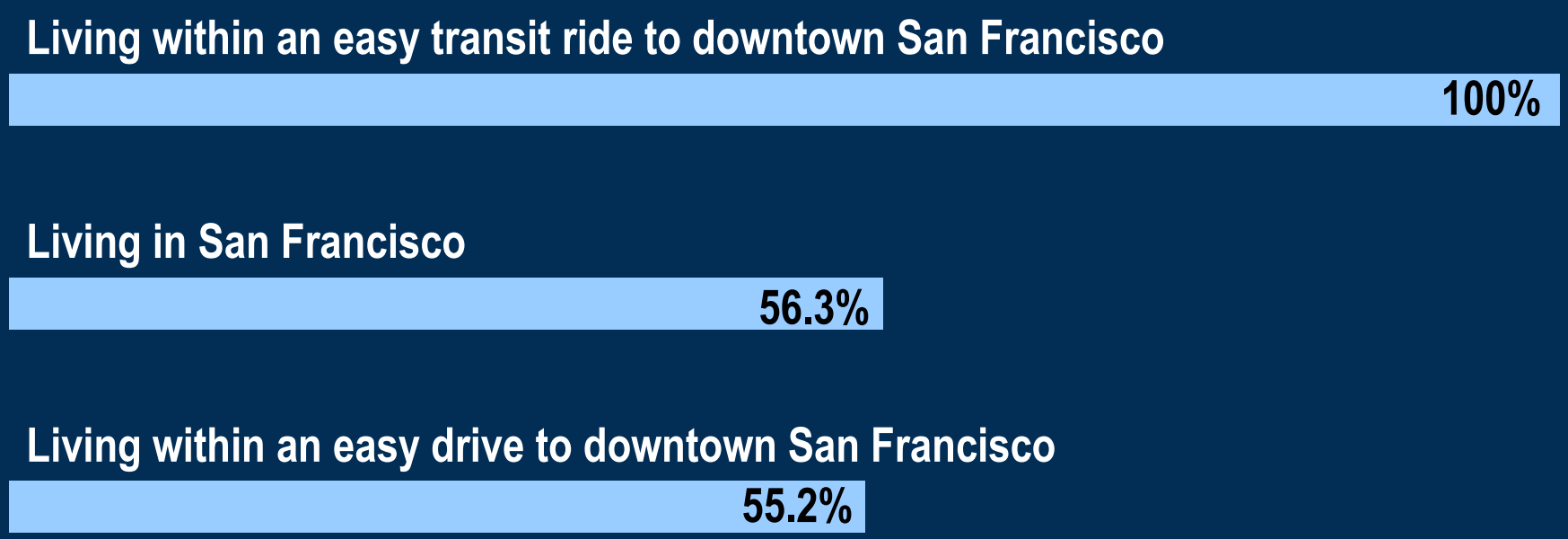
Driving Orientation
Eleven Statements



School Quality
Three Statements



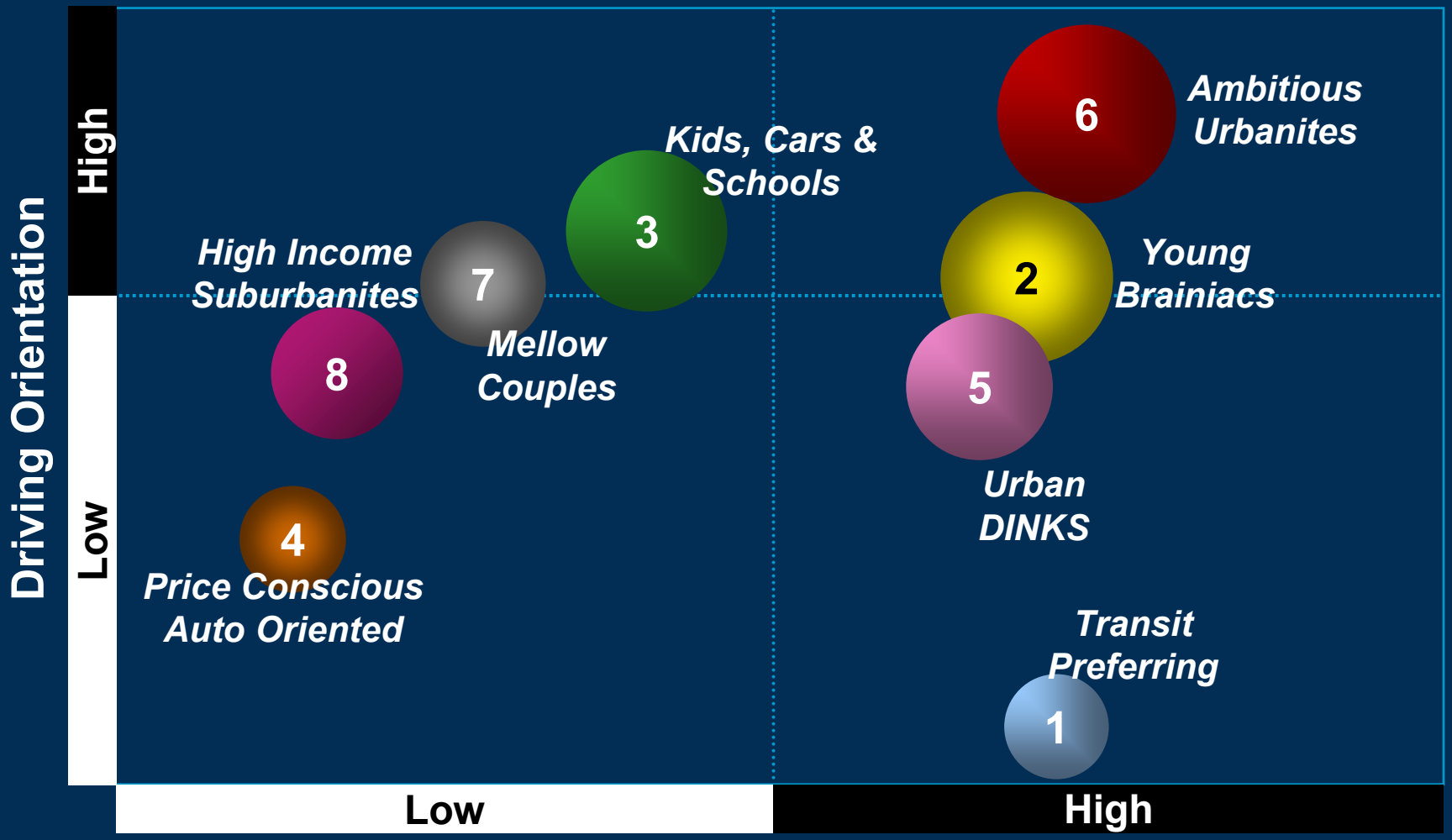
San Francisco Access Statements
Three Statements



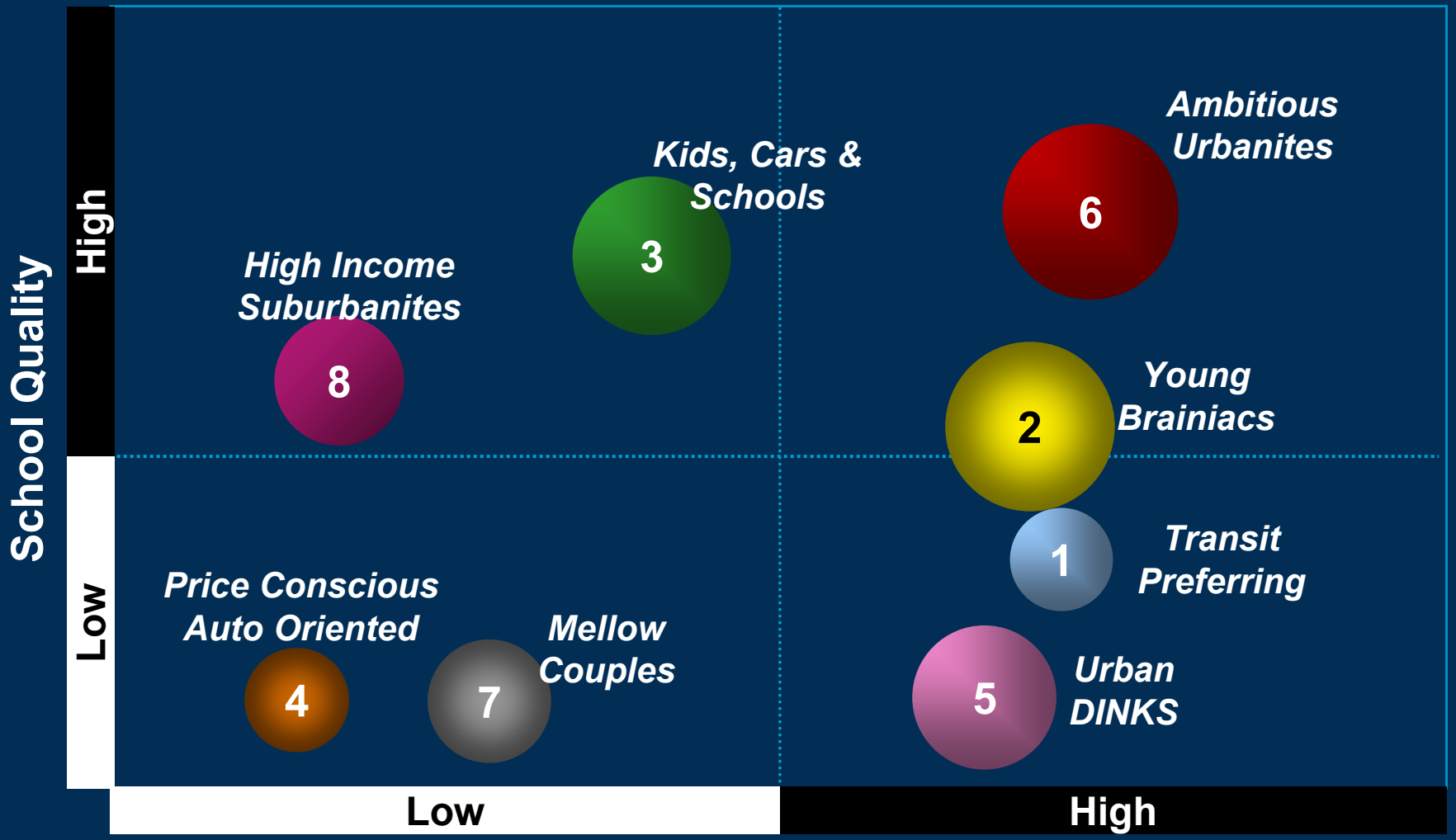
Travel Minimization
Nine Statements

- Near quick and reliable public transit, I do not frequently need a car (100%)
- Having only one or fewer dedicated parking spots is sufficient (86%)
- Living in a neighborhood that offers a mix of housing types (80%)
- Having my own garage is not important (66%)
- Living within a short commute to work (62%)
- Safe & convenient neighborhood to walk or bike for errands (54%)
- Being able to safely walk to schools (52%)
- Dedicated parking spot (50%)
- Neighborhood where there are places to spend time (41%)

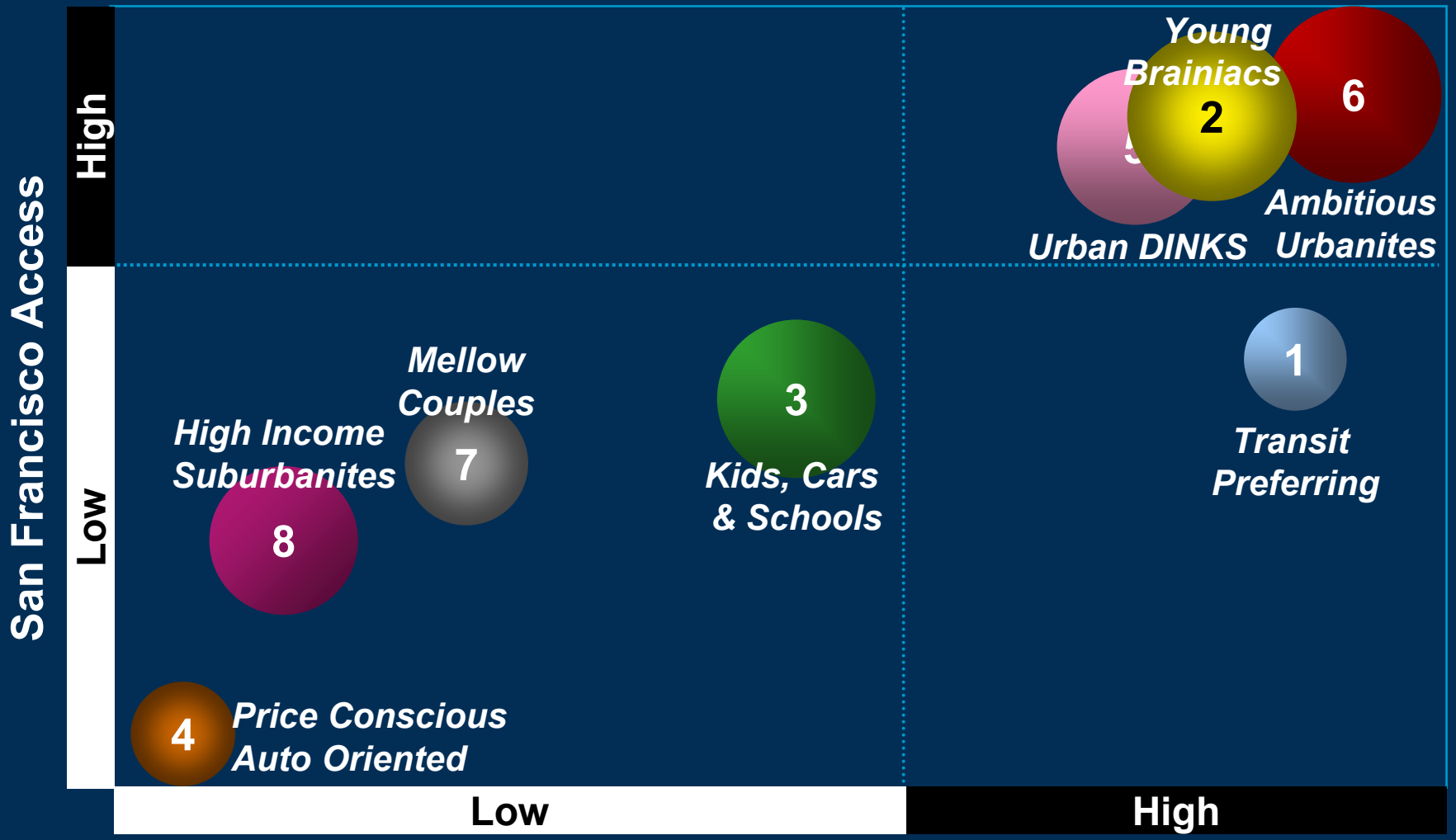
Travel Minimization vs. Driving Orientation



Travel Minimization vs. School Quality



Transit Accessibility vs. San Francisco Access



Transit Accessibility vs. Neighborhood Quiet